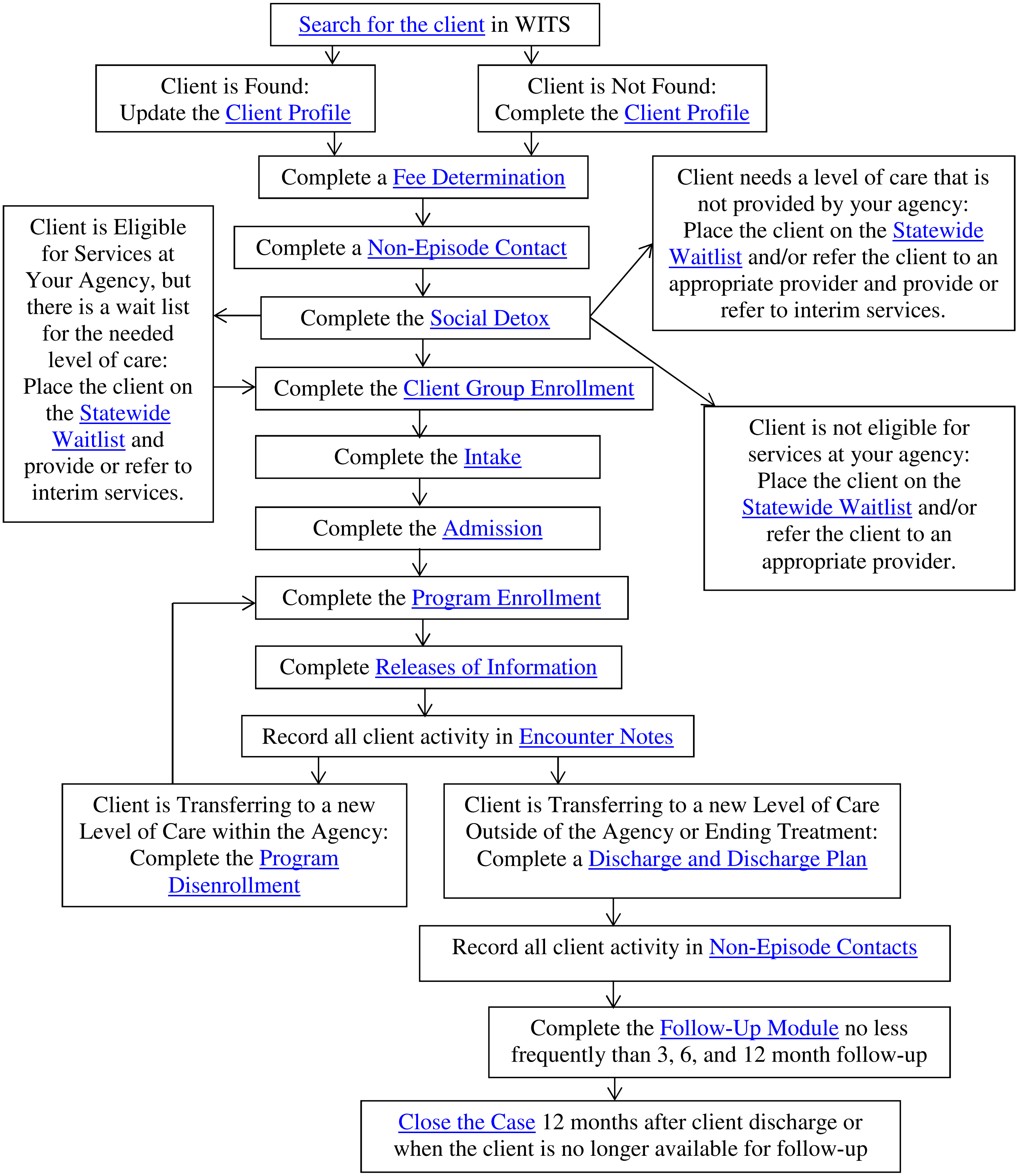
DHHS-BDAS CONTRACTED TREATMENT PROVIDER WITS GUIDE

NH DEPT. OF HEALTH AND HUMAN SERVICES
NHBDAS
BUREAU OF DRUG AND ALCOHOL SERVICES
Promoting Prevention and Recovery

DHHS-BDAS Contracted Treatment Provider WITS Workflow

The information presented in this document represents only those activities that are required for all providers. Additional features such as evaluation and treatment planning tools are available in WITS and may be used at the discretion of the provider.



Searching for a Client

1. In the navigation bar on the left of the screen:
    1.1. Click on **Client List**
2. In the work area on the right section of the screen:
    2.1. Enter client identifying data in the text boxes in the *Client Search* section
    2.2. Click **Go**
    2.3. The *Client List* section will display a list of clients matching the criteria you entered
    2.4. Hover over the **Pencil Icon** next to the name of the client you would like to work with for additional options.

- The search function in WITS works only for exact matches. If the client you are looking for does not come up when you search, try:
    - Using different search criteria, such as date of birth or social security number; or
- Using the *, which functions as a wild card in WITS, so instead of entering "Jones" in the *Last Name* text box, enter "J*"

Client Profile

Creating a New Client Profile

1. Access the *Client List*
2. In the work area on the right section of the screen:
   2.1. Click **Add Client**. This will open up the *Client Profile*
   2.2. Complete all yellow fields on the *Profile* screen
   2.3. Click **Save**
3. In the navigation bar on the left of the screen:
   3.1. Click **Additional Information**
4. In the work area on the right section of the screen:
   4.1. Complete all yellow fields on the *Additional Information* screen
   4.2. Click the **Forward Arrow**. This will move you to the *Contact Info* screen
   4.3. Enter the client's phone and email information
   4.4. Click **Add Address**
   4.5. Complete all yellow fields on the *Address Information* screen
   4.6. Click **Finish**. This will move you back to the *Contact Info* screen
   4.7. Click **Finish** on the *Contact Info* screen.

Updating an Existing Client Profile

1. Access the *Client List*
2. In the work area on the right section of the screen:
   2.1. Hover over the **Pencil Icon** and click **Profile** when the menu appears
3. In the navigation bar on the left of the screen:
   3.1. Utilize the subheadings under *Client Profile* to navigate through the screens and make any needed changes.

- When you enter an address and click **Finish**, WITS will automatically attempt to validate the address for you and will ask you to confirm the address if the address cannot be validated. Review the address information to make sure it is correct and then click **Select** to keep the address as is or **Edit** to change the address.

Fee Determination

1. In the navigation bar on the left of the screen:

   1.1. Click **Client List**

   1.2. Click **Fee Determination**

2. In the work area on the right section of the screen:

   2.1. Click **Add New**

   2.2. Complete all yellow fields

   2.3. Click **Calculate Fee Percentage**

   2.4. Click **Save**

   2.5. Click **Generate Report** to create the Fee Determination Form

3. Carefully review all of the information on the Fee Determination Form with the client. Once the form has been reviewed and all information is correct, both the client and staff member must sign the form. **The Fee Determination is a legal document and cannot be changed, please be absolutely certain that all information is correct before proceeding to Step 4!**

4. In the work area on the right section of the screen:

   4.1. Change the *Has client signed paper form?* drop down to **Yes**

   4.2. Change the *Has staff member signed paper form?* drop down to **Yes**

   4.3. Click **Finish**

- Guidelines for determining client income:
  - Existing income: The client should provide an estimate of their average income for the last 4 weeks.
  - New income: The client should estimate their expected income.
  - Self-Employment: The net income amount from the client's tax return if one has been filed. If not, client should estimate based on their monthly income and expenses.
- If nothing happens when you click **Generate Report** check to make sure that your pop-up blocker is turned off.
- You must create a new fee determination with the client whenever there is a change in income and no less frequently than every 4 weeks.

Non-Episode Contact

1. In the navigation bar on the left of the screen:

    1.1. Click on **Non-Episode Contact**

2. In the work area on the right of the screen:

    2.1. Click **Add New Non-Episode Contact Record**

    2.2. Complete all yellow fields on the *Non-Episode Contact Note* screen

    2.3. Click **Finish**

When completing Non-Episode Contacts for Continuous Recovery Monitoring:

- For *Contact Reason*, select **Continuous Recovery Monitoring**.
- Include a *Note* detailing the outcome of the contact.
- For *Outcome*, select:
    - **CRM – Attempt 1** for the first unsuccessful attempt at contact.in a series
    - **CRM – Attempt 2** for the second unsuccessful attempt at contact in a series
    - **CRM – Attempt 3** for the third unsuccessful attempt at contact in a series
    - **CRM – Completed** for a successful contact
- For *Follow-Up Steps*, select **Continue Continuous Recovery Monitoring** or **Discontinue Continuous Recovery Monitoring** along with any other appropriate follow-up steps.

Social Detox Screener

In order for a client to potentially qualify for an Access performance payment, the first service (other than evaluation) must be within 10 days of the date the social detox screener was completed, so it is critical that a new social detox screener be completed for each new episode of care.

1. In the navigation bar on the left of the screen:

   1.1. Click **Social Detox Screen**

2. In the work area on the right of the screen:

   2.1. Click **Add New**

   2.2. Complete all yellow fields on the *Pre-Admission Screening Client Profile* screen

   2.3. Click the **Forward Arrow**

   2.4. Complete all yellow fields on the *Pre-Admission Screening Substance Use* screen. If the client does not indicate a secondary or tertiary substance, select **None** in the *Substance* drop down menu.

   2.5. Click **Add Treatment**

   2.6. Complete all yellow fields on the *Treatment Profile* screen.

   2.7. Click **Finish**

   2.8. Repeat 3.5 – 3.7 until all treatment events have been entered

3. In the navigation bar on the left of the screen:

   3.1. Click **Legal**

4. In the work area on the right of the screen:

   4.1. Enter the number of arrests in the past 30 days

   4.2. Click the **Forward Arrow**

   4.3. Select the appropriate response from the *Actual Outcome* drop down

   4.4. Click **Finish**

Client Group Enrollment

1. In the navigation bar on the left of the screen:
    1.1. Click on **Client Profile**
    1.2. Click on **Client Group Enrollment**
2. In the work area on the right of the screen:
    2.1. Click **Add BDAS Contract Enrollment**
    2.2. Make the appropriate selections from the drop down menus under *Government Contract Billing Information*. For the *Plan-Group* dropdown, please use:
        2.2.1. BDAS Contracted Services-Incarcerated Individuals for clients who are incarcerated in state or county prison or jail.
        2.2.2. BDAS Contracted Services-Women's Specialty for women who are receiving specialty women's services.
        2.2.3. BDAS Contracted Services-BDAS Contracted Services for all other clients.
    2.3. Click **Save**

Intake and Admission

1. In the work area on the right section of the screen:
    1.1. Search for the client that you want to start an episode of care for.
    1.2. Hover over the **Pencil Icon** and click **Activity List** next to the name of the client you want to create an enrollment for. This will bring you to the *Episode List*.
    1.3. Click **Start New Episode**
    1.4. When asked "Would you like to associate the most recent Social Detox Screener…?", click **Yes**
    1.5. Complete all yellow fields on the *Intake Case Information* screen.
    1.6. Click **Finish**
2. In the navigation bar on the left of the screen:
    2.1. Click on **Admission**
    2.2. Click **No**.
3. In the work area on the right section of the screen:
    3.1. Complete all yellow fields on the *Admission Profile* screen
    3.2. Click the **Forward Arrow**
    3.3. Complete all yellow fields on the *Financial/Household* screen
    3.4. Click **Save** and the click the **Forward Arrow** twice to skip the *Youth Admission* screen
    3.5. Complete all yellow fields on the *Substance Abuse* screen
    3.6. Click **Save** and the click the **Forward Arrow** twice to skip the *Tobacco/Nicotine* screen
    3.7. Complete all yellow fields on the *Legal History* screen
    3.8. Click **Save** and the click the **Forward Arrow** three times to skip the *Assessment Scores* and *ASAM PPC-2R* screen
    3.9. On the *Client Diagnosis* screen click **Edit Diagnosis** to add diagnosis information.
    3.10. Use the drop down menus to add the client's diagnosis information.
    3.11. Click **Save**.
    3.12. Repeat steps 3.10 – 3.11 until all client diagnoses have been entered. Click **Finish**

Program Enrollment

1. In the navigation bar on the left of the screen:

    1.1. Click on **Program Enroll**

2. In the work area on the right section of the screen:

    2.1. Click **Add Enrollment**

    2.2. In the *Program Enrollment* field, choose the appropriate program. Complete all other yellow fields on the *Program Enrollment Profile* screen

    2.3. Click **Finish**

Client Consents

At a minimum, you must complete a client consent to BDAS for any client who is entered into WITS system.

1. In the navigation bar on the left of the screen:
   1.1. Click on **Consent**
2. In the work area on the right section of the screen:
   2.1. Click on **Add New Client Consent Record**
   2.2. If asked "Is this admission related to a waitlist record?", select the appropriate response:
   2.3. If you click **Yes**, a dropdown menu will appear with all of the agencies that have accepted the client to their waitlist, select the agency that you are making the referral to.
   2.4. Select either BDAS or All Other Agencies from the *Entities with Disclosure Agreements* drop down
   2.5. Complete all yellow fields by either entering the requested information or reviewing the information that defaulted in.
      2.5.1. In the *Earliest Date of Services to Be Consented* box enter the date of first contact.
   2.6. Click **Save**
   2.7. Click **Generate Report**, print the consent form and have the client sign it
   2.8. Close the *Print Report* box
   2.9. Change *Has the client signed the paper agreement form* drop down to **Yes**
   2.10. Enter the date the client signed the consent
   2.11. Click **Finish**

Encounter Notes

1. In the navigation bar on the left of the screen:
   1.1. Click on **Encounters**
2. In the work area on the right section of the screen:
   2.1. Click on **Add Encounter**
   2.2. Complete or review and confirm all yellow fields on the *Encounter Screen*
   2.3. Complete the start time, end time, and duration fields, even if they are not yellow
   2.4. Click **Save**
   2.5. Click the **Forward Arrow**
   2.6. Change the *Allow Disclosure?* dropdown to "Yes"
   2.7. Enter your note in the *Unsigned Notes* box
   2.8. Click on **Sign Note**
   2.9. Click **Save**
   2.10. Click on **Finalize Encounter** or **Release to Billing**

Program Disenrollment

1. In the navigation bar on the left side of the screen:

    1.1. Click **Program Enroll**

2. In the work area on the right section of the screen:

    2.1. Hover over the **Pencil Icon** and click **Review** when the menu appears.

    2.2. Hover over the **Pencil Icon** and click **Review** next to *Client Program Enrollment*

    2.3. Enter the *End Date* and *Termination Reason*

    2.4. Click **Save**

    2.5. Click **Complete TEDS/NOMS Disenroll Status**

    2.6. Click **Save**

    2.7. For clients who are transferring to a new level of care within the agency: Click **Transfer to Another Program** to begin a new program enrollment

    2.8. For clients who are transferring to a new level of care outside of the agency or ending treatment proceed to the Discharge instructions on the next page.

Discharge

1. In the navigation bar on the left of the screen:
    1.1. Click **Discharge Plan**
2. In the work area on the right section of the screen
    2.1. Click **Add New**
    2.2. Complete the yellow fields
    2.3. Click **Finish**
    2.4. Repeat 4.1 – 4.3 until all services have been added
    2.5. Click the **Forward Arrow**
    2.6. Repeat 4.1 – 4.5 until all medications and community partners have been added
3. In the navigation bar on the left side of the screen:
    3.1. Click **Discharge**
4. In the work area on the right side of the screen:
    4.1. Complete or review all yellow fields on the *Discharge Profile* screen and click the **Forward Arrow**
    4.2. Complete or review all yellow fields on the *Legal History* screen and click the **Forward Arrow**
    4.3. Complete or review all yellow fields on the *Status Change Since Admission* screen and click the **Forward Arrow**
    4.4. Complete or review all yellow fields on the *Substance Abuse/Discharge Parameters* screen and click **Finish**
    4.5. When prompted “Client is discharged. Do you want to close this case also?”, click **No**

Follow-Up

In order to qualify for outcomes performance payments and avoid possible contract liquidations, the follow-up module must be completed at least at 3, 6, and 12 months post discharge. More frequent follow-up with discharged clients is strongly recommended.

1. In the navigation bar on the left side of the screen:
   1.1. Click **Follow-up**
2. In the work area on the right of the screen:
   2.1. Click **Add New Annual Update Record**
   2.2. Complete the *Follow-Up Profile* screen
   2.3. Click the **Forward Arrow**
   2.4. Complete the *Follow-Up Profile (cont.)* screen
   2.5. Click the **Forward Arrow**
   2.6. Complete the *Follow-Up Profile Substance Abuse* screen. If there is no substance use, select **None**
   2.7. Click the **Forward Arrow**
   2.8. Complete the *Follow-Up Health* screen.
   2.9. Click **Finish**

Closing a Case

Once continuous recovery monitoring is completed you will need to close the intake and end the client group enrollment. Continuous Recovery Monitoring is considered completed 12 months after discharge or when the client is no longer available for follow-up.

1. From the *Client List* in the work area on the right side of the screen:

    1.1. Hover over the **Pencil Icon** and click **Activity List**. This should bring you to the *Episode List*. If it does not, click **Episode List** in the navigation bar on the left side of the screen.

    1.2. Hover over the **Pencil Icon** for the episode that you are closing and click **Review**

2. In the navigation bar on the left side of the screen:

    2.1. Click **Client Profile > Client Group Enrollment**

3. In the work area on the right side of the screen:

    3.1. Hover over the **Pencil Icon** for the client group enrollment you are ending and click **Edit**.

    3.2. In the *End Date* field, enter the date that the client group enrollment ended.

    3.3. Click **Save**.

    3.4. Repeat steps 3.1 – 3.3 for all necessary client group enrollments

4. In the navigation bar on the left side of the screen:

    4.1. Click **Activity List**

5. In the work area on the right side of the screen:

    5.1. Hover over the **Pencil Icon** for *Intake Transaction* and click **Review**

    5.2. In the *Date Closed* field at the bottom of the screen, enter the date that the case was closed

    5.3. Click **Save & Close the Case**

    5.4. Click **Finish**

Statewide Waitlist

Section 8 of your contract requires certain activities in the Waitlist, this section is laid out to guide you through the actions required to meet these requirements.

Adding clients to the waitlist for your programs and other programs

1. In the navigation bar on the left of the screen:
   1.1. Click **State Waitlist**
2. In the work area on the right side of the screen:
   2.1. Hover over the **Pencil Icon** for the program that you want to add the client to the waitlist for and click **Review List** when the menu pops up.

   2.2. Click **Add Client to Waitlist**

   2.3. In the *Client Name* field, type the name of the client that you want to add to the waitlist and complete the remaining yellow fields as well as the "Other Priority Options" selection.

   2.4. You may elect to add the client to all waitlists for the given modality or not. All clients should be added to the waitlist for your program and as many waitlists for the needed modality as they are willing to be placed on and which are reasonable for them to access.

   2.5. Click **Finish**

   2.6. When prompted "Are you sure you want to add . . . " click **Yes** or **No** as appropriate

Keeping information up-to-date for clients that you have added to the waitlist for another program

1. In the navigation bar on the left of the screen:
   1.1. Click **State Waitlist** > **My Clients**
2. In the work area on the right of the screen:
   2.1. Use the search fields to find the client(s) you need to update.

   2.2. To update client waitlist information: Hover over the **Pencil Icon** for the client and program that you want to update and click **Review** when the menu pops up. Click **Finish** when you are done editing the client information.

   2.3. To delete a client from the waitlist of a program: Hover over the **Pencil Icon** for the client and program that you want to delete and click **Delete** when the menu pops

Reviewing and managing clients added to your waitlist by another program

1. In the navigation bar on the left of the screen:

    1.1. Click **State Waitlist** > **My Programs**

2. In the work area on the right of the screen:

    2.1. Use the search fields to find the programs and/or clients that you want to work with.

    2.2. To accept pending clients: Hover over the **Pencil Icon** for the client and choose **Accept** when the menu pops up. Please do not ever choose **Reject** as this will prevent the client from ever being placed on the waitlist for your program in the future. If you are unable to accept a client onto your waitlist, please contact the referring program and notify them of this so that they can delete the referral.

    2.3. When a slot or bed becomes available for a client added to the waitlist by another program, you will need to contact that program to let them know that you have an available opening so that they can complete a referral and consent allowing you to view additional information about and contact the client.

Completing a referral to an outside agency

When an agency contacts you to let you know that they have an available opening for a client you placed on their waitlist you will need to complete an intake (if one has not already been done), consent and referral to that agency.

1. Access the client list and search for the client that you want to complete the referral for.

2. In the work area on the right side of the screen:

    2.1. Hover over the **Pencil Icon** next to the name of the client you would like to work with and click **Activity List** when the menu pops up.

3. In the navigation bar on the right side of the screen:

    3.1. Click **Referrals**

4. In the work area on the right side of the screen:

    4.1. Click **Add New Client Referral Record**

    4.2. Complete the *Referral* fields

    4.3. Click **Finish**

Reviewing Client Information and Responding to Referrals

Once the agency that placed the client on your waitlist has completed the consent and referral, you will be able to view additional information about the client via the WITS system and respond to the referral.

3. In the navigation bar on the left of the screen:
    3.1. Click on **Client List**
4. In the work area on the right section of the screen:
    4.1. Enter relevant information in the *Client Search* fields at the top of the screen
    4.2. Click **Go**
    4.3. The client should appear under the *Clients with Consents from Outside Agencies* heading
    4.4. Hover over the **Pencil Icon** and click on **Activity List** to view client information from the referring agency to determine whether or not you will provide services to the client.

Once you have determined whether or not you will provide services to the client, contact the client to notify them of your decision and schedule an intake appointment if you will be offering services to the client.

5. In the navigation bar on the left of the screen:
    5.1. Click on **Agency** > **Referrals > Referrals In**
6. In the work area on the right section of the screen:
    6.1. Search for the client you want to respond to the referral for
    6.2. Hover over the **Pencil Icon** next to the client's name and click **Review** when the menu pops up
    6.3. Change *Referral Status* to desired response.
        6.3.1. **Placed/Accepted**: You intend to provide services to the client. If you are accepting a referral, DO NOT change the referral status to **Placed/Accepted** until the client has actually attended their intake appointment.
        6.3.2. **Referral Created/Pending**: Used by the referring agency when creating a new referral.
        6.3.3. **Referred Terminated**: Used by referring agency to cancel a referral. The responding agency should not use this status.
        6.3.4. **Refused Treatment**: When you contacted the client to initiate services, they stated that they no longer intended to pursue services with you. Include an explanatory comment.

6.3.5. **Rejected by Program**: You cannot provide the authorized services to the client at this time, you could not reach the client to schedule an appointment, or the client does not attend the initial appointment. Include an explanatory comment.

6.4. Click **Finish**